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more than 30 days late.	Termination Date:	Ternination	Amendment	Report Type Annual (May 15)	ر ا
A \$200 penalty shall be assessed against anyone who files	Employing Office:	— Officer Or — Employee	State: GA ives District: 3	Filer Member of the U.S. Status House of Representatives	ω <u>"</u>
(Office Use Only)	(Daytime Telephone)		(Full Name)	(Full	
) 2010 MILE OF BILLA	4787420085		Jim Marshall	Jim N	
7. 17. 17. 17. 18. 18. 18. 18. 18. 18. 18. 18. 18. 18					
AUG 1 3 201	FORM A Page 1 of 11 For use by Members, officers, and employees	VES	SCLOSURE STATEME	UNITED STATES HOUSE OF REPRESENTATIVES CALENDAR YEAR 2009 FINANCIAL DISCLOSURE STATEMENT	ე ⊆

PRELIMINARY INFORMATION -- ANSWER EACH OF THESE QUESTIONS

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If yes, complete and attach Schedule V.	Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period?	period? If yes, complete and attach Schedule IV.	Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting	more than \$1,000 at the end of the period? If yes, complete and attach Schedule III.	Did you, your spouse, or a dependent child receive "unearned" income of more than \$200 in the reporting period or hold any reportable asset worth	If yes, complete and attach Schedule II.	Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article in the reporting period?	If yes, complete and attach Schedule I.	Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period?
1	Yes No 🖳		Yes 🏹 No ¨	•	Yes 🗸 No		Yes ⊡ No 🔀		Yes 🗸 No
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schedule attached for each "Yes" response.	Each question in this part must be answered and the appropriate	If yes, complete and attach Schedule IX.	Did you have any reportable agreement or arrangement with an outside entity?	If yes, complete and attach Schedule VIII.	Did you hold any reportable positions on or before the date of filing in the VIII. current calendar year?	If yes, complete and attach Schedule VII.		If yes, complete and attach Schedule VI.	
	appi		Ύes		ĕ		Ύes		Yes
Ī	opri		8		Yes ✔ No		No 4	-	No 🗸
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EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION -- ANSWER EACH OF THESE QUESTIONS

Trusts-	Details regarding "Qualified Blind Trusts" approved by the Committee on Standards of Official Conduct and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?	Yes No 🗸
Exemptions-	Exemptions— Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Standards of Official Conduct.	Yes No.

SCHEDULE I - EARNED INCOME

Name Jim Marshall

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totaling \$200 or more during the preceding calendar year. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000. Page 2 of 11

Office of the Chapter 13 Trustee Spouse's Salary N/A	Source	Туре	Amount
	Office of the Chapter 13 Trustee	Spouse's Salary	N/A

•	SCHEDULE III
	- ASSETS AND
	` <u>.</u>
	UNEARNED"
	INCOME

Name Jim Marshall Page 3 of 11

BLOCK B

Asset and/or Income Source

BLOCK A

that is not publicly traded, state the name of the business, the nature of and its value at the end of the reporting period. For an active business plans that are not self-directed, name the institution holding the account retirement plans (such as 401(k) plans) that are self directed (i.e., plans than \$200 in "unearned" income during the year. For rental property or and (b) any other assets or sources of income which generated more a fair market value exceeding \$1,000 at the end of the reporting period, information, see the instruction booklet. its activities, and its geographic location in Block A. For additional in the account that exceeds the reporting threshold. For retirement in which you have the power, even if not exercised, to select the specific mutual funds (do not use ticker symbols). For all IRAs and other land, provide a complete address. Provide full names of stocks and Identify (a) each asset held for investment or production of income with investments), provide the value and income information on each asset year. If you use a

parent or sibling; any deposits totaling \$5,000 or less in personal debt owed to you by your spouse, or by your or your spouse's child, savings accounts; any financial interest in or income derived from U.S Exclude: Your personal residence(s) (unless there is rental income); any Government retirement programs.

in the optional column on the far left. that of your spouse (SP) or dependent child (DC) or is jointly held (JT) If you so choose, you may indicate that an asset or income source is

Wilkinsons County

12.5 % of 46.5 acres in

\$15,001 -

\$50,000

SP

American Growth Fund(ML)

\$15,000 \$1,001 -

DS

GAINS/DIVIDEN

\$15,000 \$1,001 - \$15,000 \$1,001 - \$15,000 \$1,001 - \$15,000 \$1,001 -

SP

American Euro Pacific(ML)

SP

Allianz

SP

Alabama Power Co(ML)

Wilkinson County, GA

7.5% Of Minerals 125 acres,

at close of reporting Value of Asset Year-End Check all colun plans or accour apply. For retin Type of In

value, please specify the value should be it is generated income, asset was sold and is the method used. It an other than fair market valuation method included only because even if reinvest other assets inc may write "NA". be listed as inco Dividends and I appropriate box income by chec IRAs, indicate the specific investm not allow you to

BLOCK C

BLOCK

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вгоск с	BLOCK D	вгоск е
Check all columns that apply. For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA". For all other assets including all IRAs, indicate the type of income by checking the appropriate box below. Dividends and Interest, even if reinvested, should be listed as income. Check "None" if asset did not generate any income during the calendar year.	Amount of Income For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA" for income. For all other assets, including all IRAs, indicate the category of income by checking the appropriate box below. Dividends and interest, even if reinvested, should be listed as income. Check "None" if no income was earned or generated.	Transactio Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.
CAPITAL GAINS	NONE	
CAPITAL GAINS	NONE	
DIVIDENDS	\$201 - \$1,000	:
INTEREST	\$201 - \$1,000	
CAPITAL GAINS/DIVIDEN DS	\$1 - \$200	
CAPITAL	\$1 - \$200	•

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CREF Money Market	CREF Growth	CREF Global Equities	CREF Bond Market	Congressional Credit Union	Coca Cola	CD Goldman Sachs	Carefusion	Cardinal Health	Branch Banking and Trust	Black Rock bond fund, formerly know as Merrill Lynch Municipal Bond Fund/	BHP Billiton	Bank of India CD	Ameritrade	SCHEDULE III - ASSETS AND "UNEARNED" INCOME
\$100,001 - \$250,000	\$1,001 - \$15,000	\$1,001 - \$15,000	\$1,001 - \$15,000	\$1,001 - \$15,000	\$15,001 - \$50,000	None	\$1,001 - \$15,000	\$1,001 - \$15,000	\$50,001 - \$100,000	\$50,001 - \$100,000	\$1,001 - \$15,000	None	\$1,001 - \$15,000	ME Name Jim Marshall
DIVIDENDS	CAPITAL GAINS	CAPITAL GAINS	DIVIDENDS	INTEREST	DIVIDENDS/CAPI TAL GAINS	INTEREST	DIVIDENDS	CAPITAL GAINS/DIVIDEN DS	Interest	INTEREST	DIVIDENDS/CAPI TAL GAINS	INTEREST	INTEREST	shall
\$201 - \$1,000	NONE	NONE	\$1 - \$200	\$1 - \$200	\$201 - \$1,000	NONE	\$1 - \$200	\$1 - \$200	\$1 - \$200	\$201 - \$1,000	\$1 - \$200	NONE	\$1 - \$200	
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SCHEDU	SCHEDULE III - ASSETS AND "UNEARNED" INCOME	OME Name Jim Marshall	shall		Page 5 of 11
	CREF Stock (Retirement)	None	CAPITAL GAINS	NONE	S
SP	Davis NY Venture	\$1,001 - \$15,000	DIVIDENDS/CAPI TAL GAINS	\$1 - \$200	
SP	Davis Opportunity Fund	\$1,001 - \$15,000	CAPITAL GAINS/DIVIDEN DS	NONE	
SP	Dryden National Muncipals	\$15,001 - \$50,000	INTEREST/DIVID	\$201 - \$1,000	
- Sp	Fedex	\$1,001 - \$15,000	CAPITAL GAINS/DIVIDEN DS	\$1 - \$200	
SP	FIA Card SVS (IAXX) (MLSEP)	\$100,001 - \$250,000	DIVIDENDS	NONE	ס
SP	Fidelity Magellan	\$1,001 - \$15,000	DIVIDENDS/CAPI TAL GAINS	\$1 - \$200	
	Fideltiy Contrafund(527)	\$1,001 - \$15,000	CAPITAL GAINS	NONE	
SP	Jennison Utility Fund (2 acct, ML and Prudential)	\$15,001 - \$50,000	DIVIDENDS/CAPI TAL GAINS	\$201 - \$1,000	
	Jennison Utility Fund formerly Prudential Utilities Fund	\$15,001 - \$50,000	CAPITAL GAINS/DIVIDEN DS	\$1 - \$200	
SP	Jennison Value Fd	\$15,001 - \$50,000	CAPITAL GAINS/DIVIDEN DS	NONE	
	McGinnis Capital LP	\$100,001 - \$250,000	CAPITAL GAINS	NONE	
JT	Merrill Lynch Cash Management Account	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	:

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-	SCHEDL	SCHEDULE III - ASSETS AND "UNEARNED" INCOME	OME Name Jim Marshall	arshall		Page 6 of 11
	SP	Merrill Lynch Bank Depost fund	\$100,001 - \$250,000	INTEREST	\$201 - \$1,000	
	SP	Merrill Lynch Bank USA 2nd sep	None	INTEREST	NONE	m {
	SP	Merrill Lynch Consults IXIS-CDP-C	None	Capital Gains	NONE	o
		Merrill LYNCH CONSULTS- Allianz (formerly managed byAIM INVESCO)	\$250,001 - \$500,000	CAPITAL GAINS/DIVIDEN DS	NONE	
	SP	Merrill Lynch Institutional Fund	\$50,001 - \$100,000	INTEREST	\$201 - \$1,000	
	TU	Merrill Lynch Institutional Funds	\$250,001 - \$500,000	INTEREST	\$201 - \$1,000	
	SP	Met Life Affiliates	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
		Nation wide money market, formerlyGartmore Money Mkt Fd Ps	\$1,001 - \$15,000	INTEREST	NONE	· · · · · · · · · · · · · · · · · · ·
	SP	National City Bank CD	None	INTEREST	\$201 - \$1,000	<u> </u>
		Nationwide Fund D(formerly gartmore)	\$1,001 - \$15,000	CAPITAL GAINS	NONE	
		Nationwide LGCAP GR formerly American Century Ultra	\$1,001 - \$15,000	CAPITAL GAINS	NONE	
-		New Inter Val Inst Svc	\$1,001 - \$15,000	CAPITAL GAINS	NONE	
	SP	Oracle	\$1,001 - \$15,000	CAPITAL GAINS	NONE	

SCHEDU	SCHEDULE III - ASSETS AND "UNEARNED" INCOME	OME Name Jim Marshall	rshall		Page 7 of 11
Sp	Professional Women's Investment Group	\$1,001 - \$15,000	CAPITAL GAINS/DIVIDEN DS	NONE	
SP	Prudential Stock	\$1,001 - \$15,000	Dividends	\$1 - \$200	
SP	RVS Disciplined Equity Fund CL A	\$1,001 - \$15,000	CAPITAL GAINS	NONE	
Sp	RVS Large Cap Equity Fund	\$15,001 - \$50,000	CAPITAL GAINS	NONE	
SP	RVS Tax-exempt High Income Fund	\$1,001 - \$15,000	INTEREST	NONE	<u> </u>
SP	Symetra Life Retirment Services	\$15,001 - \$50,000	INTEREST	\$201 - \$1,000	
JT	T. Rowe Price Science and Technology Fund	\$1 - \$1,000	CAPITAL GAINS	NONE	 :
Ţ	T. Rowe Price Tax Exempt Money Market	\$50,001 - \$100,000	DIVIDENDS	\$201 - \$1,000	:
JT	T. Rowe Price Tax Free Short Intermediate	\$15,001 - \$50,000	DIVIDENDS	NONE	
SP	Templeton Growth(ML)	\$1,001 - \$15,000	CAPITAL GAINS/DIVIDEN DS	\$1 - \$200	
	TIAA Real Estate	\$1,001 - \$15,000	CAPITAL GAINS	NONE	
:	TIAA Traditonal(Retirement)	\$250,001 - \$500,000	INTEREST	\$5,001 - \$15,000	
!	TIAA-Cref International Equty	\$1,001 - \$15,000	CAPITAL GAINS	NONE	
,	TIAA-Cref Lifecycle Fund 2015	None	CAPITAL GAINS	NONE	S

SCHEDULE III - ASSETS AND "UNEARNED" INCOME	
Nan	i
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im Marsh	

SP SP SP Walgreen Vanguard 500 Index Fund United States Savings Bonds TIAA-Cref Small Cap Value TIAA-Cref Midcap Value \$1,001 -\$15,000 \$15,001 -\$50,000 \$50,001 -\$100,000 None None shall CAPITAL GAINS/DIVIDEN DS INTEREST/CAPI TAL GAINS DIVIDENDS/CAPI NONE TAL GAINS CAPITAL GAINS INTEREST NONE NONE NONE \$1,001 - \$2,500 ഗ S Page 8 of 11

SCHEDULE IV - TRANSACTIONS

Name Jim Marshall

Page 9 of 11

Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange out. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below. transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented

SP, DC,	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
SP	Bank of India cd	S	No	06/2009	\$100,001 - \$250,000
SP	Bank of India CD	P	N/A	12/01/2009	\$50,001 - \$100,000
SP	Carefusion	D .	N/A	May 2009	\$1,001 - \$15,000
JT	CD Goldman Sachs	S :	No	01/09/2009	\$50,001 - \$100,000
SP	CREF Money Market	י י	N/A	03/12/2009	\$100,001 - \$250,000
	Cref(Stock) Retirement	σ	No	03/12/2009	\$100,001 - \$250,000
SP	FIA Card SVS (IAXX) (MLSEP)	ָּ י	NA	03/15/2009	\$100,001 - \$250,000
SP	Merrill Lynch Consults IXIS-CDP-C	S	No	03/12/2009	\$250,001 - \$500,000
SP	ML Retirment Reserves(SEP)	P	N/A	03/15/2009	\$100,001 - \$250,000
SP	National City Bank	8	No	01/02/2009	\$50,001 - \$100,000
	TIAA-Cref Lifecycle Fund 2015	S	No	03/12/2009	\$15,001 - \$50,000

SCHEDULE VIII - POSITIONS

Name Jim Marshall

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Report all positions, compensated or uncompensated, held during the current calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or any business enterprise, any nonprofit organization, any labor organization, or any educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities; positions solely of an honorary nature; and positions listed on Schedule I.

Position	Name of Organization
Pro Bono Counsel	Better Business Bureau
Baord	Education First/Community First
President	Macon Heritage Housing Foundatiion
Board Member	Board of Visitors, United States Military Academy

FOOTNOTES	ES	Name Jim Marshall	Page 11 of 11
Number	Section / Schedule	Footnote	This note refers to the following item
	General Info	Carefusion	stock obtained by a spinoff from Cardinal health
2	General Info	Bank of India	6 month CD
ω	General Info	Cref Stock fund and Cref Life cycle fund	sold and moved into the Cref money market
4	General Info	Merrill Lynch IXIS-CDP-C	sold funds moved to different ML fund